

BEFORE THE PERSONNEL APPEALS BOARD

STATE OF WASHINGTON

HELEN MANN,

Appellant,

v.

DEPARTMENT OF TRANSPORTATION,

Respondent.

Case No. ALLO-01-0026

ORDER OF THE BOARD FOLLOWING
HEARING ON EXCEPTIONS TO THE
DETERMINATION OF THE DIRECTOR

Hearing on Exceptions. This appeal came on for hearing before the Personnel Appeals Board, WALTER T. HUBBARD, Chair, and RENÉ EWING, Member, on Appellant's exceptions to the Director's determination dated October 2, 2001. The hearing was held at the office of the Personnel Appeals Board in Olympia, Washington, on April 12, 2002. GERALD L. MORGEN, Vice Chair, did not participate in the hearing or in the decision in this matter.

Appearances. Appellant Helen Mann was present and was represented by Shelley Brandt, Attorney at Law of Cordes and Brandt, P.L.L.C. Carol Bogue, Human Resource Manager, represented Respondent Department of Transportation.

Background. On December 20, 1999, Appellant submitted a classification questionnaire (CQ) requesting reallocation of her position as a Fiscal Technician to a Transportation Technician 2. The review of Appellant's position was suspended while the department conducted an internal review within the Maintenance Office to determine whether any modifications were necessary to the

1 support positions in the department. However, the review did not result in any changes to the
2 classes.

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4 The department conducted a desk audit of Appellant's position and by letter dated April 18, 2001,
5 Carol Bogue, Human Resource Manager, informed Appellant that her position was properly
6 allocated as a Fiscal Technician. On May 22, 2001, Appellant appealed this determination to the
7 director of the Department of Personnel. On September 24, 2001, Paul Peterson, Personnel
8 Hearings Officer, conducted an allocation review and by letter dated October 2, 2001, informed
9 Appellant that her position should be reallocated to the class of Office Assistant Senior. On
10 October 30, 2001, Appellant filed exceptions with the Personnel Appeals Board to the
11 determination of the Department of Personnel.

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13 Appellant works at the Eastern Region Spokane Maintenance office, and she is supervised by Terrie
14 Dahlgren, Office Support Supervisor. The Spokane Maintenance Office is authorized to issue
15 Eastern Regional Permits as well as Washington oversize load permits. Appellant's responsibilities
16 include processing and preparing permits for the movement of overweight and/or oversize vehicles
17 on Washington State roads and highways; communicating information regarding permit fees and
18 load information; collecting payments; balancing daily cash and bankcard receipts; justifying and
19 preparing daily bank deposits; and maintaining files and preparing audit files.

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21 **Summary of Appellant's Argument.** Appellant argues that her position goes beyond merely
22 issuing permits, and she contends that her responsibilities include planning transportation routes
23 and collection of information regarding load limits as well as other transportation restrictions which
24 must be routinely retained and updated. Additionally, Appellant asserts that she is responsible for
25 coordinating with other departments to ensure there is a free flow of traffic available to allow
26 oversized loads or restrictive passage of any given route.

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2 Appellant disagrees that her position should be allocated to the Office Assistant Senior class and
3 she asserts that her position is not limited to record keeping and processing financial documents.
4 Appellant contends that her position requires that she establish, keep, log and prepare permits for
5 oversized loads and other permits. She contends that the majority of her time is spent writing and
6 establishing permits and/or course of travel for specific loads. Appellant asserts that the department
7 has oversimplified her job in the planning of traffic over the state's roads and highways. Appellant
8 asserts that the Transportation Planning Technician 2 is a better fit based on her duties and
9 responsibilities.

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11 **Summary of Respondent's Argument.** Respondent asserts that Appellant is more properly
12 allocated to the Fiscal Technician class. Respondent asserts that the function of issuing permits to
13 use the roadways for oversize or overweight loads is not part of the planning process and that
14 Appellant is not involved in the analysis of data for that purpose. Respondent argues that while
15 Appellant coordinates information with other sections of the Department of Transportation and
16 local agencies in order to obtain route information, this coordination does not constitute
17 transportation planning as required by the Transportation Planning series.

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19 Respondent asserts that in issuing permits, Appellant employs technical financial skills not
20 associated with the typical office assistant series and that activities such as collecting money,
21 balancing cash and bank card receipts, and preparing invoice vouchers are clearly technical
22 financial tasks. Respondent asserts that the Department of Personnel failed to recognize the level of
23 financial related activities performed by Appellant which constitutes the majority of Appellant's
24 work assignments. Therefore, Respondent asserts that Appellant should be reallocated to the Fiscal
25 Technician class.

1 **Primary Issue.** Whether the director's determination that Appellant's position should be allocated
2 to the Office Assistant Senior classification should be affirmed.

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4 **Relevant Classifications.** Fiscal Technician, class code 12030; Office Assistant Senior, class code
5 01011; and Transportation Planning Technician 2, class code 67810.

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7 **Decision of the Board.** The purpose of a position review is to determine which classification best
8 describes the overall duties and responsibilities of a position. A position review is neither a
9 measurement of the volume of work performed, nor an evaluation of the expertise with which that
10 work is performed. Also, a position review is not a comparison of work performed by employees in
11 similar positions. A position review is a comparison of the duties and responsibilities of a particular
12 position to the available classification specifications. This review results in a determination of the
13 class which best describes the overall duties and responsibilities of the position. Liddle-Stamper v.
14 Washington State University, PAB Case No. 3722-A2 (1994).

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16 There is little dispute that Appellant spends a significant amount of her work time issuing a variety
17 of permits and collecting payments. Because no single classification describes the majority of the
18 duties of her position, the question here is which of the available classifications describes the
19 **overall** duties and responsibilities of her position.

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21 The definition of a Transportation Planning Technician 2 states, "Under general supervision
22 performs semiskilled technical duties in transportation planning involving the classification and
23 summarization of various types of field information for data bank retention for further analysis by
24 others. In a field crew configuration, performs as the assistant to the team leader." Assignments at
25 this level involve performance of field and office duties with a variety of data types and collection
26 and summarization techniques. After reviewing Appellant's approved CQ, we conclude that

1 Appellant does not perform these tasks and that her position does not meet the intent of the
2 Transportation Planning Technician 2.

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4 The definition for the Fiscal Technician classification states that the incumbent “performs a variety
5 of manual or automated fiscal record keeping tasks. Processes, balances and enters financial source
6 documents which include travel vouchers, field orders, invoice vouchers and/or payroll documents.
7 These functions involve calculating and applying simple cost allocations.” Positions allocated to
8 this classification typically apply account techniques and utilize manual and automated methods to
9 process a variety of fiscal data. Appellant’s duties do not meet the scope or breadth of duties
10 intended to be encompassed by this classification.

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12 The definition for the Office Assistant Senior classification indicates that the incumbent “performs
13 a variety of complex clerical duties.” The Office Assistant Senior classification is intended to
14 encompass positions that perform a wide variety of complex clerical duties including responding to
15 inquiries regarding rules, regulations, policies, and procedures; preparing, reviewing, verifying and
16 processing fiscal documents such as vouchers, purchase requests, and invoices; using basic
17 arithmetic to perform computations; and issuing permits and collecting fees. This classification
18 describes the scope of Appellant's responsibilities and the work she does to prepare and issue over
19 dimensional permits. Although Appellant does not perform the wide variety of clerical duties
20 envisioned by this classification, the overall scope and level of responsibilities of her position fall
21 within the description of the duties encompassed by the class. Therefore, on a best fit basis,
22 Appellant's position is properly allocated to the Office Assistant Senior classification.

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24 **Conclusion.** Appellant’s position is properly allocated, on a best fit basis, to the classification of
25 Office Assistant Senior. Therefore, the appeal on exceptions by Appellant should be denied and the
26 Director’s determination dated October 2, 2001, should be affirmed and adopted.

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ORDER

NOW, THEREFORE, IT IS HEREBY ORDERED that the appeal of Helen Mann is denied, and the attached Director’s determination, dated October 2, 2001, is affirmed and adopted.

DATED this _____ day of _____, 2002.

WASHINGTON STATE PERSONNEL APPEALS BOARD

Walter T. Hubbard, Chair

René Ewing, Member